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France

Tomatoes and Products

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Approved by:

Frank J. Piason

U.S. Embassy

Prepared by:

Marie-Cécile Hénard

Report Highlights:

Although a net importer of fresh and processed tomato products, France is not a market for U.S. tomato products. Morocco and Spain are France's leading suppliers of fresh tomatoes, while Italy and Spain are the primary suppliers of canned tomatoes and paste. For 2001, France obtained a significant increase in its European Union production quota for processed tomatoes.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary	1
Section I: Situation and Outlook	2
Tomatoes for the fresh market	2
.....	2
Tomatoes for Processing	3
Section II: Statistical Tables	4
Fresh Tomatoes	4
Canned Whole Peeled Tomatoes	7
Tomato Paste	10

Executive Summary

Although a net importer of fresh and processed tomato products, France is not a market for U.S. tomato products. Morocco and Spain are France's leading suppliers of fresh tomatoes, with 44 and 38 percent of French imports in MY 1999/2000. At the same time, 93 percent of French imports of canned whole peeled tomatoes and 69 percent of tomato paste came from Italy and Spain. France obtained a significant increase in its production quota for processed tomatoes in the very recently reformed Common Market Organization (CMO) for fruit and vegetables, from 299,384 MT deliveries of fresh tomatoes in 2000 to 401,608 MT in 2001. However, France's production quota remains marginal as a 4 percent of the total EU quota.

Section I: Situation and Outlook

Tomatoes for the fresh market

According to the French Ministry of Agriculture and Fisheries, French production of fresh tomatoes in 1998, 1999 and 2000 included the following:

		1998	1999	2000
Area Planted (ha)	Greenhouses	2,163	2,148	2,097
	Open Fields	1,671	1,413	1,305
	Total Area	3,834	3,561	3,402
Production (MT)	Greenhouses	477,206	474,576	477,697
	Open Fields	84,429	71,835	60,135
	Total Production	561,635	546,410	537,832
Yields (MT/ha)	Greenhouses	221	221	228
	Open Fields	51	51	46

Fresh tomato production decreased by 1.6 percent from 1999 to 2000, due mainly decreased area planted and to reduced open field production, which was hurt by adverse weather conditions (low temperatures and rains in early summer). The slight increase in greenhouse production did not offset the significant decline in open field production.

France is a net importer of fresh tomatoes, its main suppliers being Morocco (44 percent in MY 1999/2000) and Spain (38 percent). France's leading export market is Germany, with 48 percent of French exports in MY 1999/2000. There are minor exports of fresh tomatoes from France to the United States (113 in MY 1999/2000), which have almost decreased by half from MY 1998/1999 to MY 1999/2000, due to the increased U.S. tariff rates on this product, which is on the U.S. retaliation list in the hormone-beef WTO issue.

Tomatoes for Processing

France is a minor producer of processed tomato products, and the French quota of fresh tomatoes for processing is the smallest in the EU (4 percent). Higher quotas exist for Italy, Spain, Greece and Portugal, with 53, 15, 15 and 13 percent of the EU 2001 quota, respectively.

Deliveries of fresh tomatoes to processors in France and EU quotas for France amounted to the following in 1998, 1999, and 2000 (in MT):

	Deliveries 1998	Deliveries 1999	1999 EU Quota	Deliveries 2000	2000 EU Quota
Tomato Paste	248,000	280,000	250,822	246,000	225,740
Canned Whole Peeled Tomatoes	28,000	29,500	32,502	23,000	29,252
Other Tomato Products	52,000	61,500	49,324	51,000	44,392
Total	328,000	371,000	332,648	320,000	299,384

As indicated in the above table, France exceeded its production quota for tomato paste and other products in 1999 and 2000. Quantities produced above the quotas do not benefit from EU subsidies (tomato processors get subsidies from the EU if they purchase fresh tomatoes at a minimum price that they pay to tomato growers). Consequently, French tomato producers and processors recently pushed for an increase in the French production quota. They obtained a 34 percent increase in French total quota to 401,608 MT in 2001 at the EU Agriculture Council in November 2000, which approved the European Commission's proposed changes to the Common Market Organization (CMO) for fruit and vegetables. Although significantly growing, French production quota remains low as a 4 percent of the global EU quota, which was increased to 8.25 million MT. The processor subsidy was also increased from 29.84 Euro per MT in 2000 to 34.5 Euro per MT in 2001.

Italy and Spain are France's leading suppliers of processed tomato products. In MY 1999/2000, French imports from Italy accounted for 68 percent of canned whole peeled tomatoes and 50 percent of tomato paste. At the same time, French imports from Spain accounted for 25 percent and 19 percent, respectively.

Information on the world market for processed tomatoes can be found on the following internet web site: <http://www.tomate.org> This web site includes information in English and French on world production, regional organizations for processed tomatoes, and companies processing tomatoes.

Section II: Statistical Tables

Fresh Tomatoes

PSD Table						
Country	France					
Commodity	Fresh Tomatoes				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Plnt For Fresh Consump	0	3834	0	3561	0	3402
Plnt For Processing	0	5233	0	5777	0	5600
TOTAL Area Planted	0	9067	0	9338	0	9002
Harv. For Fresh Cons.	0	3834	0	3561	0	3600
Harv. For Processing	0	5233	0	5777	0	5600
TOTAL Area Harvested	0	9067	0	9338	0	9200
Fresh Sale Production	0	561635	0	546410	0	537832
Processing Production	0	327000	0	375079	0	370000
TOTAL Production	0	888635	0	921489	0	907832
TOTAL SUPPLY	0	888635	0	921489	0	907832

Export Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	MY Aug/July	Units:	MT
Exports for:	1998		1999
U.S.	204	U.S.	113
Others		Others	
Germany	37166	Germany	42002
Belgium	11242	Belgium	9246
Netherlands	9502	Italy	5873
Czech Rep.	5782	Czech Rep.	5355
Italy	5430	Netherlands	5130
Austria	5423	Switzerland	4214
UK	4281	UK	4049
Switzerland	3411	Spain	3628
Spain	2055	Austria	1606
Poland	1089	Slovakia	1247
Total for Others	85381		82350
Others not Listed	6253		5660
Grand Total	91838		88123

Import Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	Aug/July	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	11
Others		Others	
Morocco	178178	Morocco	167890
Spain	153630	Spain	146365
Belgium	24959	Belgium	26774
Netherlands	15980	Netherlands	20215
Italy	12666	Italy	11165
Israel	2184	Israel	4027
Tunisia	1038	Tunisia	1598
Germany	577	Senegal	614
Senegal	422	Germany	389
Total for Others	389634		379037
Others not Listed	1149		1252
Grand Total	390783		380300

Canned Whole Peeled Tomatoes

PSD Table						
Country	France					
Commodity	Canned Tomatoes				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Deliv. To Processors	28000	28000	29500	29500	29000	23000
Beginning Stocks	6000	6000	9937	9937	10037	8833
Production	21100	21100	21600	21600	21000	17000
Imports	91651	91651	90000	82312	90000	87000
TOTAL SUPPLY	118751	118751	121537	113849	121037	112833
Exports	8814	8814	10000	5016	10000	5000
Domestic Consumption	100000	100000	101500	100000	101500	100000
Ending Stocks	9937	9937	10037	8833	9537	7833
TOTAL DISTRIBUTION	118751	118751	121537	113849	121037	112833

Export Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	MY Aug/July	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Belgium	3118	Belgium	2462
Germany	1894	UK	1033
UK	1382	Netherlands	295
Italy	505	Germany	260
Netherlands	498	Italy	211
Ireland	226	Ireland	157
Total for Others	7623		4418
Others not Listed	1191		598
Grand Total	8814		5016

Import Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Aug/July	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Italy	58312	Italy	56189
Spain	29391	Spain	20249
Greece	727	Netherlands	2758
Belgium	684	Portugal	1294
Germany	547	Greece	442
Israel	209	Belgium	322
		Germany	306
Total for Others	89870		81560
Others not Listed	1781		752
Grand Total	91651		82312

Tomato Paste

PSD Table						
Country	France					
Commodity	Tom. Paste, 28-30% TSS Basis				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Deliv. To Processors	240000	248000	230000	280000	0	246000
Beginning Stocks	1240	1240	3740	6444	5740	32060
Production	41000	44100	39000	48100	0	44500
Imports	43000	46229	45000	70690	0	45000
TOTAL SUPPLY	85240	91569	87740	125234	5740	121560
Exports	6500	5125	7000	10174	0	10000
Domestic Consumption	75000	80000	75000	83000	0	85000
Ending Stocks	3740	6444	5740	32060	0	26560
TOTAL DISTRIBUTION	85240	91569	87740	125234	0	121560

Export Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30 % TSS Basis		
Time period	MY Aug/July	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Belgium	1287	Netherlands	2920
Netherlands	759	Germany	2032
Switzerland	575	Belgium	1854
Germany	535	UK	1018
Spain	501	Switzerland	595
UK	382	Cameroon	539
Italy	278	Spain	396
Total for Others	4317		9354
Others not Listed	808		820
Grand Total	5125		10174

Import Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30 % TSS Basis		
Time period	MY Aug/July	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Italy	24377	Italy	35631
Spain	6229	Spain	13404
Portugal	5847	Portugal	8350
Greece	5029	Greece	6042
Morocco	1821	UK	1901
Netherlands	1706	Tunisia	1410
UK	477	Netherlands	1130
Germany	429	Hungary	546
		Germany	374
Total for Others	45915		68788
Others not Listed	314		1902
Grand Total	46229		70690